FIO-13 My Employee Quota Overview

View My Employee Quota Overview

Purpose

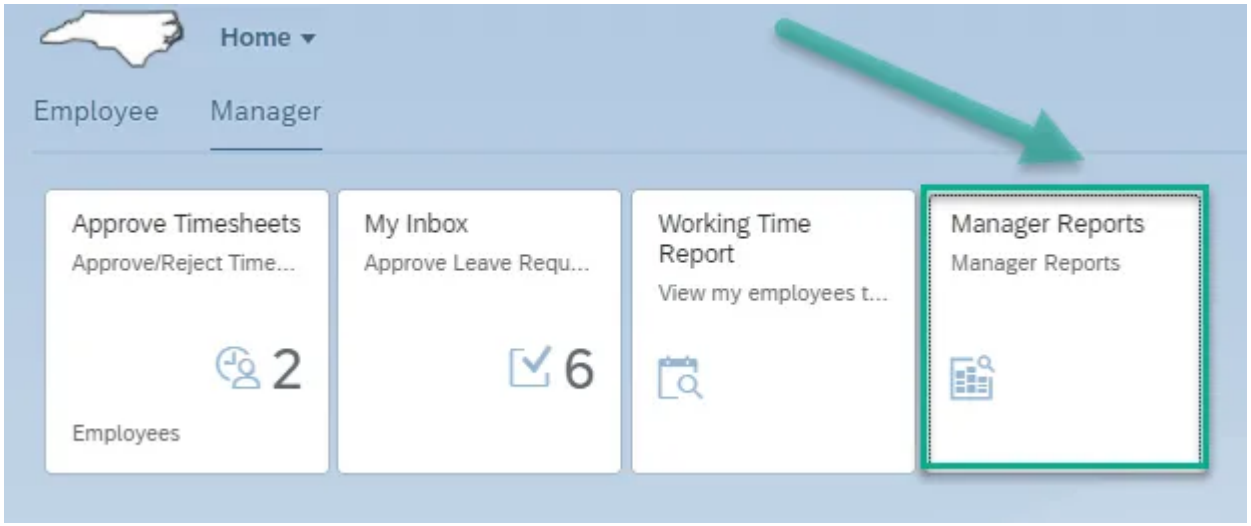
The purpose of this BPP is to explain how to access the My Employee Quota Overview Report in the Integrated HR-Payroll System via the Fiori Interface. The My Employee Quota Overview report is a manager report that provides quota available/used/entitlements hours for direct report employees. This report is available for ALL managers and Interface managers and is designed for browser use as well as mobile use.

How to Access My Employee Quota Overview

There are 7 steps to complete this process.

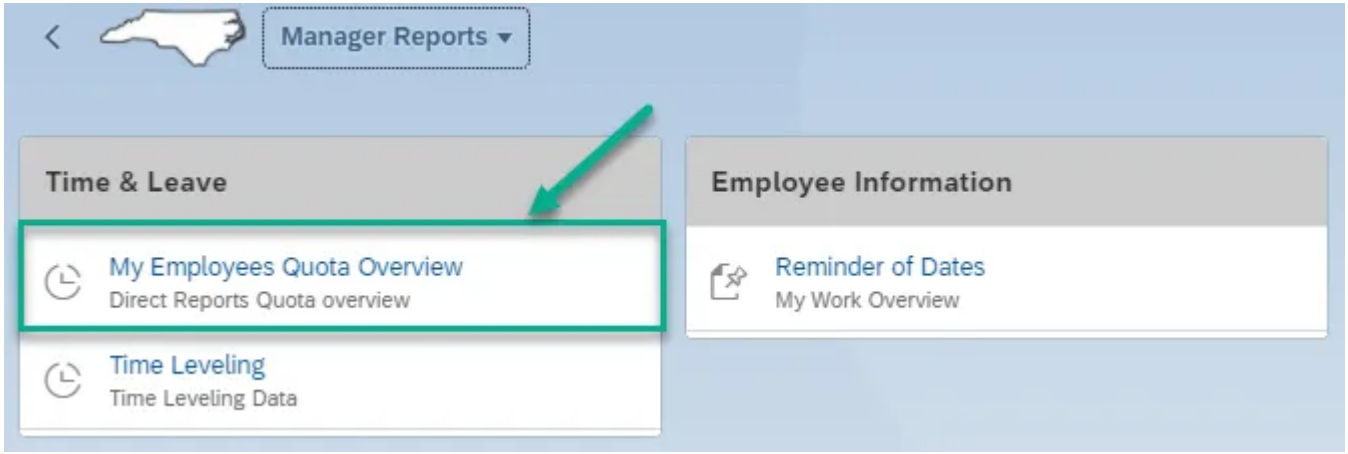
Step 1. To access the **My Employee Quota Overview** report, click on the **Manager's tab** and then click on the **Manager Reports** tile.

Image



Step 2. On the **Time & Leave** card, select the **My Employees Quota Overview** link to generate the report.

Image

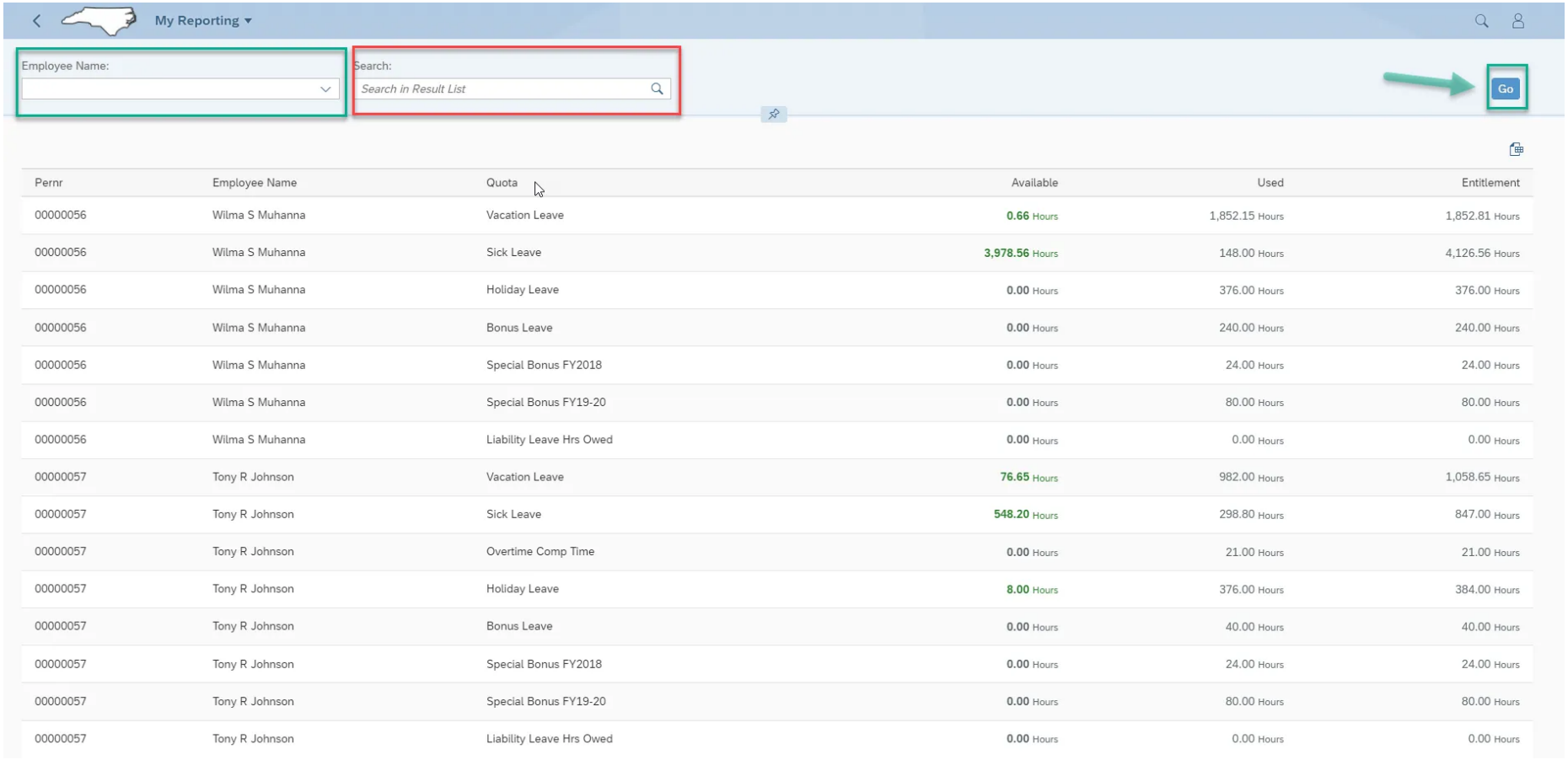


Step 3. There are two data fields within the header of the report:

- **Employee Name** = filter data field requires **Go** to apply the filter criteria after selection.

- **Search** = Allows free form entry of any variation for the Quota type **Vacation Type** (i.e., Vacation Leave or Vac) with the search icon selection.

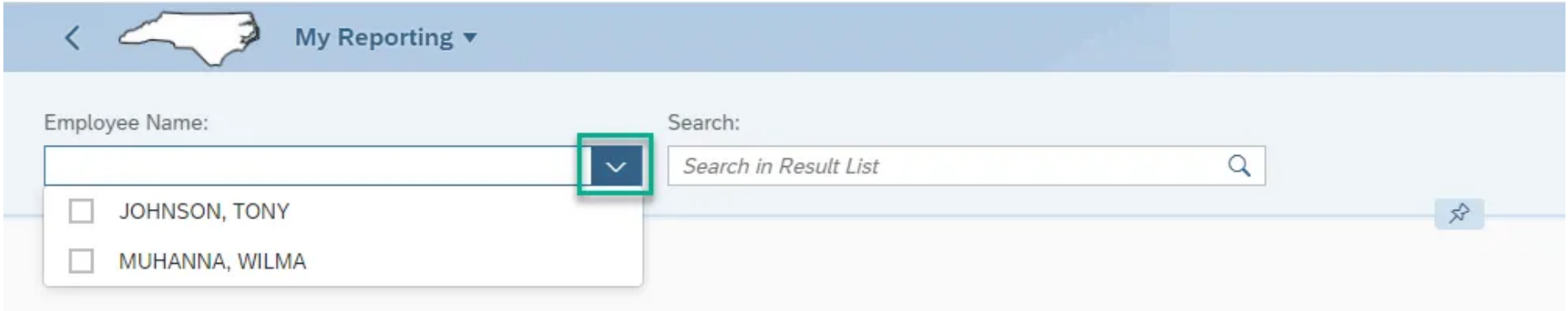
Image



Pernr	Employee Name	Quota	Available	Used	Entitlement
00000056	Wilma S Muhanna	Vacation Leave	0.66 Hours	1,852.15 Hours	1,852.81 Hours
00000056	Wilma S Muhanna	Sick Leave	3,978.56 Hours	148.00 Hours	4,126.56 Hours
00000056	Wilma S Muhanna	Holiday Leave	0.00 Hours	376.00 Hours	376.00 Hours
00000056	Wilma S Muhanna	Bonus Leave	0.00 Hours	240.00 Hours	240.00 Hours
00000056	Wilma S Muhanna	Special Bonus FY2018	0.00 Hours	24.00 Hours	24.00 Hours
00000056	Wilma S Muhanna	Special Bonus FY19-20	0.00 Hours	80.00 Hours	80.00 Hours
00000056	Wilma S Muhanna	Liability Leave Hrs Owed	0.00 Hours	0.00 Hours	0.00 Hours
00000057	Tony R Johnson	Vacation Leave	76.65 Hours	982.00 Hours	1,058.65 Hours
00000057	Tony R Johnson	Sick Leave	548.20 Hours	298.80 Hours	847.00 Hours
00000057	Tony R Johnson	Overtime Comp Time	0.00 Hours	21.00 Hours	21.00 Hours
00000057	Tony R Johnson	Holiday Leave	8.00 Hours	376.00 Hours	384.00 Hours
00000057	Tony R Johnson	Bonus Leave	0.00 Hours	40.00 Hours	40.00 Hours
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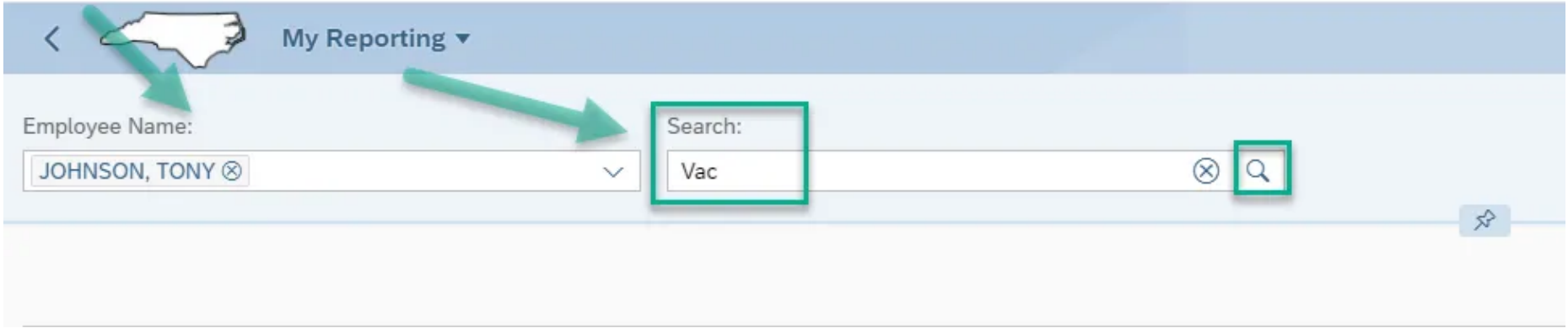
Step 4. The **Employee Name** field delivers a list of all direct reports by default. The employee's name field allows for specific employee filter selection.

Image

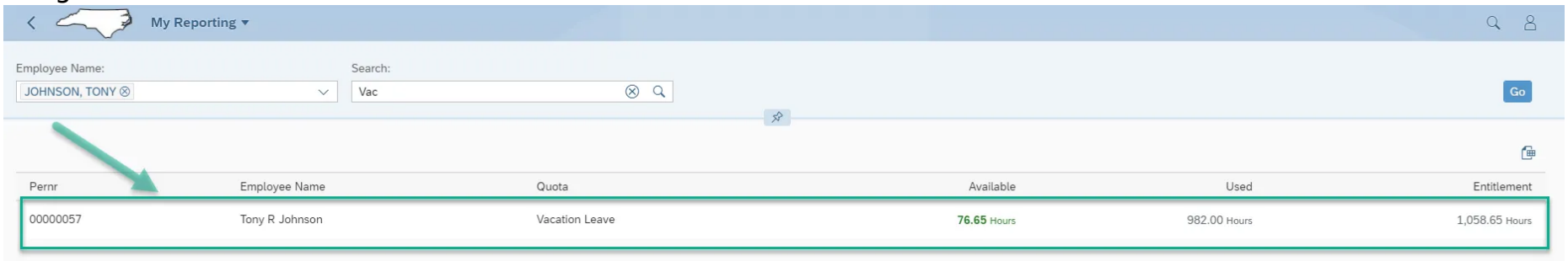


Step 5. **Search** - used to specify a specific quota type. When the Filter is defined and the search field is defined with a specific quota, and the Employee name filter is reset, the search field will be reset as well and the default to deliver all quotas is then delivered.

Image



Image

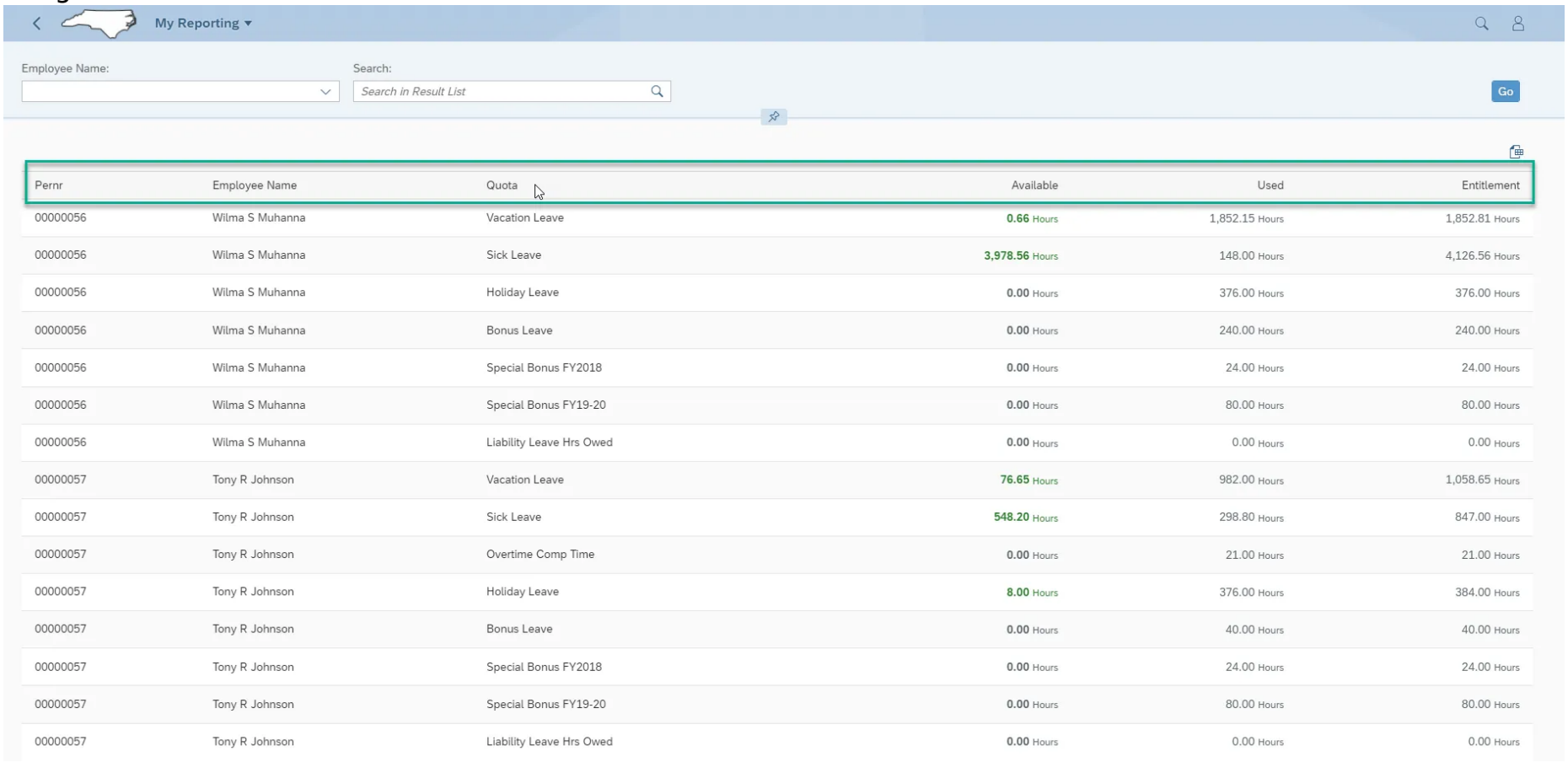


Step 6. The **My Employee Quota Overview Report** delivers a manager's direct reports Quota available/used/entitlement hours as of today.

- All available hours are shown in **GREEN**.
- All zero hours are shown in **BLACK**.
- All negative hours are shown in **RED**.

Note: Expired quota will not be shown

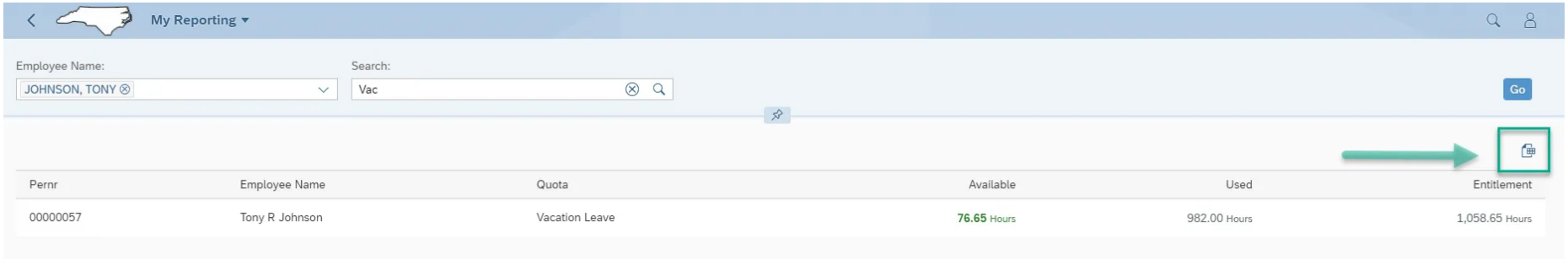
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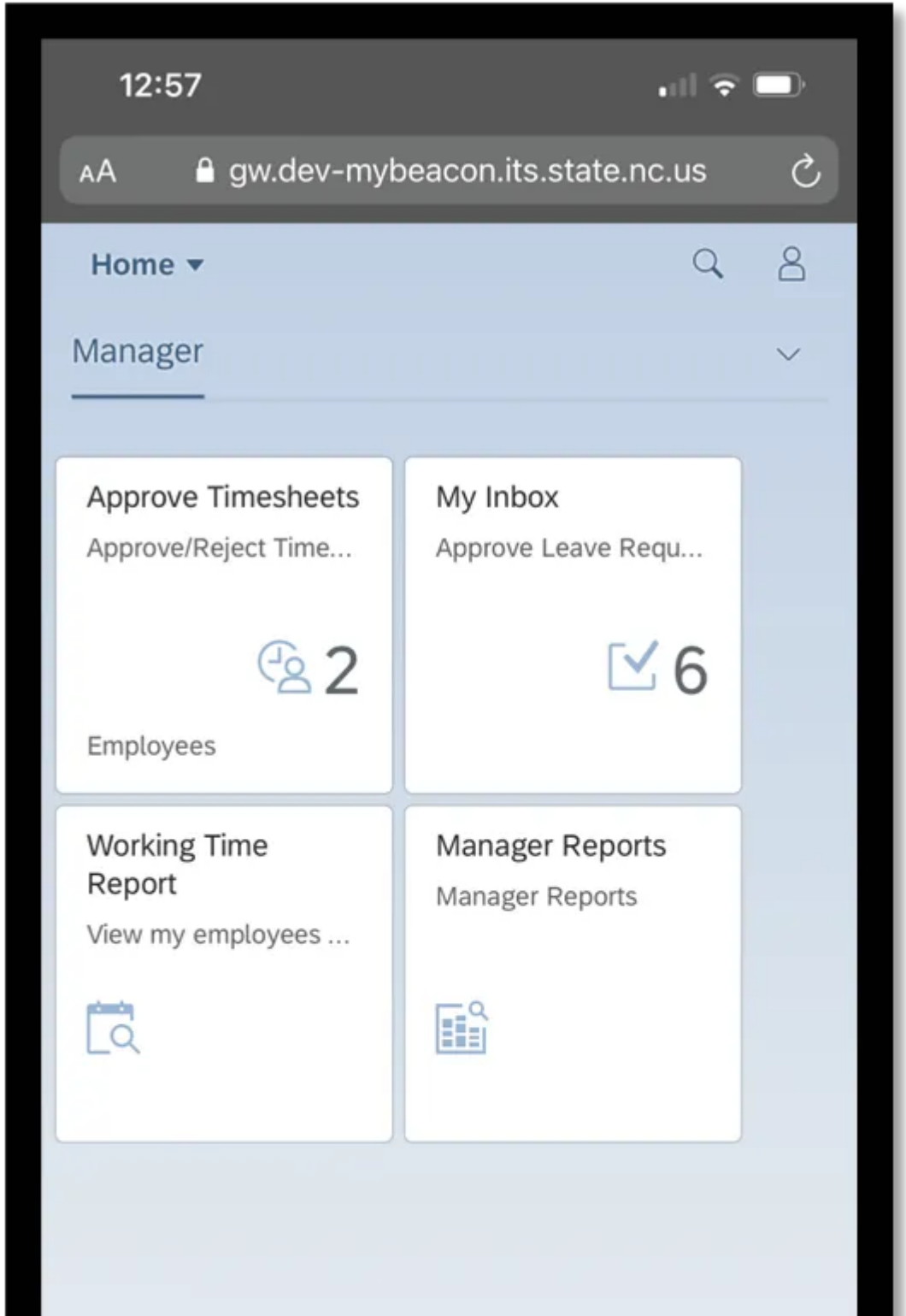
Step 7. **Export to excel** delivers the formatted data to a spreadsheet.

Image



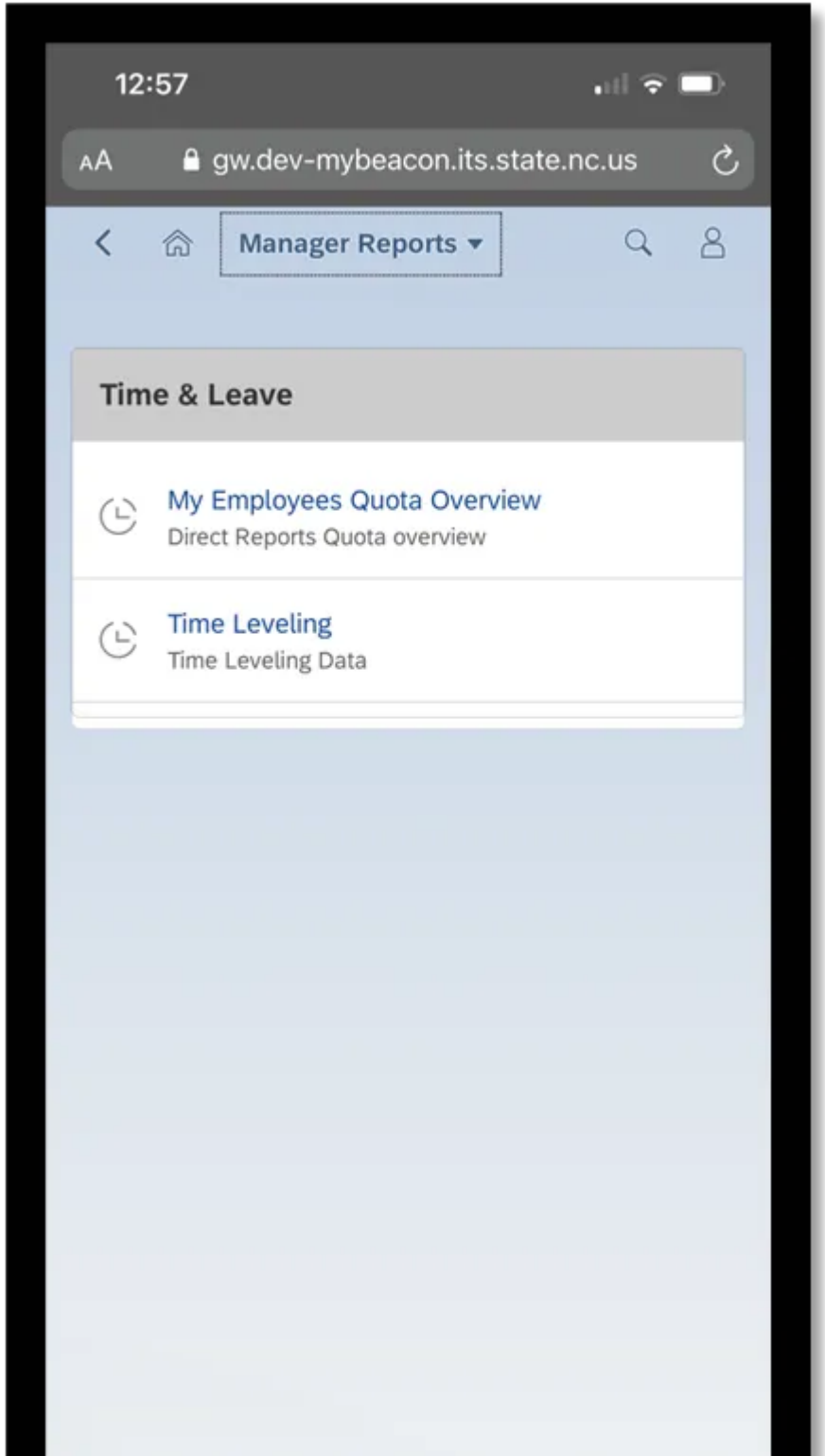
On Mobile: The **My Employee Quota Overview** report is also accessible using a **Mobile Device**. It can be accessed through the **Manager Reports** application on the Manager tab.

Image


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AA
gw.dev-mybeacon.its.state.nc.us
Home
Manager
Approve Timesheets
Approve/Reject Time...
2
Employees
My Inbox
Approve Leave Requ...
6
Working Time Report
View my employees ...
Manager Reports
Manager Reports

Select the **My Employees Quota Overview** link to generate the report.

Image


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Manager Reports
Time & Leave
My Employees Quota Overview
Direct Reports Quota overview
Time Leveling
Time Leveling Data

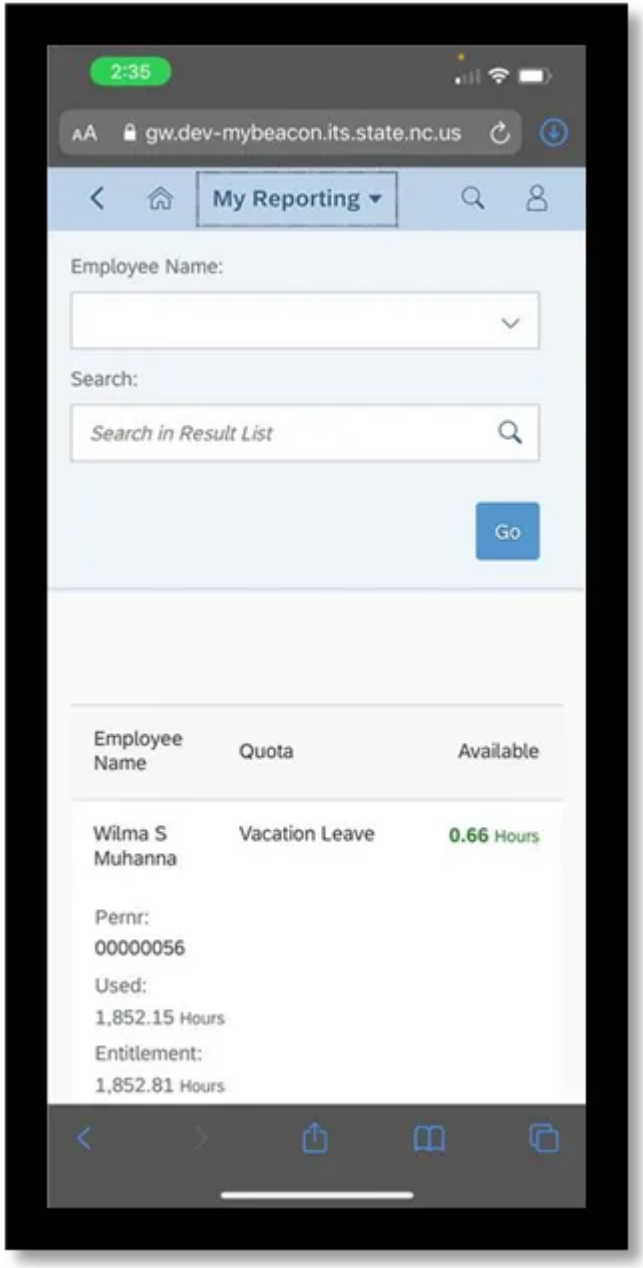
Note: Upon executing the report, the data delivered includes the Employee name, Quota and Available hours across the top and additional detail along the side for all Quota Types. By default, all direct reports are delivered and their respective quota information.

- All available hours are shown in **GREEN**.
- All zero hours are shown in **BLACK**.
- All negative hours are shown in **RED**.

Note: Expired quota will not be shown.

The **Employee Name** field allows for a selection of a single employees or a selection of multiple employees to override the report delivery of all direct reports. You can use the Search field to search for any specific Quota criteria in the report. You can use a root word (vacation) or any shortened version of the leave type (vac) to search. To apply the search field criteria, once the criteria is predefined within the search field, the user should select **Enter**, then **GO** for report execution and delivery of the report.

Image


2:35
AA
gw.dev-mybeacon.its.state.nc.us
My Reporting
Employee Name:
Search:
Search in Result List
Go
Employee Name
Quota
Available
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First Published

Wed, 11/10/2021

Last Updated

Tue, 10/21/2025

Printable PDF